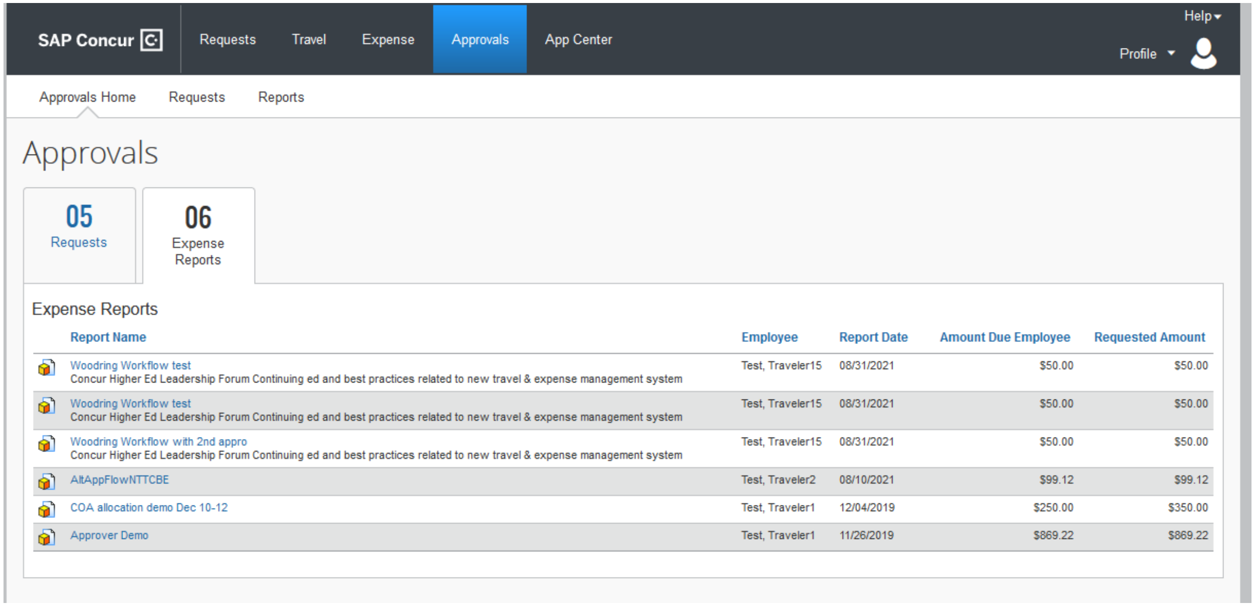
WESTERN WASHINGTON UNIVERSITY

Travel Services

SAP Concur

Approver Quick Guide

1. [Log in to Concur]
2. **Click Approvals** at the top of page or **Required Approvals.** Request (travel authorization) and Expense Report documents are separated on tabs. The number indicates the total pending your approval:



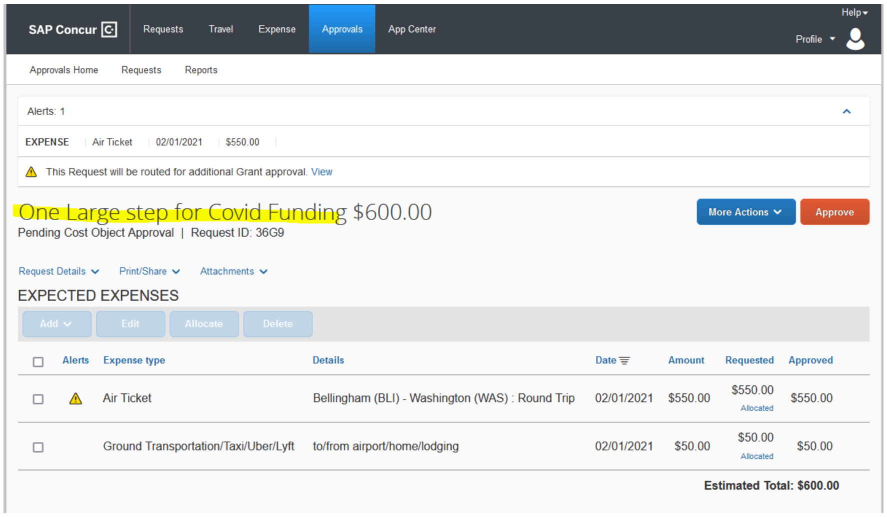
Expense Reports

Report Name	Employee	Report Date	Amount Due Employee	Requested Amount
Woodring Workflow test Concur Higher Ed Leadership Forum Continuing ed and best practices related to new travel & expense management system	Test, Traveler15	08/31/2021	$50.00	$50.00
Woodring Workflow test Concur Higher Ed Leadership Forum Continuing ed and best practices related to new travel & expense management system	Test, Traveler15	08/31/2021	$50.00	$50.00
Woodring Workflow with 2nd appro Concur Higher Ed Leadership Forum Continuing ed and best practices related to new travel & expense management system	Test, Traveler15	08/31/2021	$50.00	$50.00
AltAppFlowNTTCBE	Test, Traveler2	08/10/2021	$99.12	$99.12
COA allocation demo Dec 10-12	Test, Traveler1	12/04/2019	$250.00	$350.00
Approver Demo	Test, Traveler1	11/26/2019	$869.22	$869.22

3. **Select Requests or Expense Reports tab**, then **click the Request or Report Name** to open.

NOTE: the Expense Reports approver view will look slightly different from the Request approver views shown below.

4. **Review the information on the Header** by clicking on the Trip Name:


SAP Concur
Requests
Travel
Expense
Approvals
App Center
Help
Profile
Approvals Home
Requests
Reports
More Actions
Approve
Request Details
Print/Share
Attachments
Add
Edit
Allocate
Delete

Alerts: 1

EXPENSE | Air Ticket | 02/01/2021 | $550.00

⚠ This Request will be routed for additional Grant approval. View

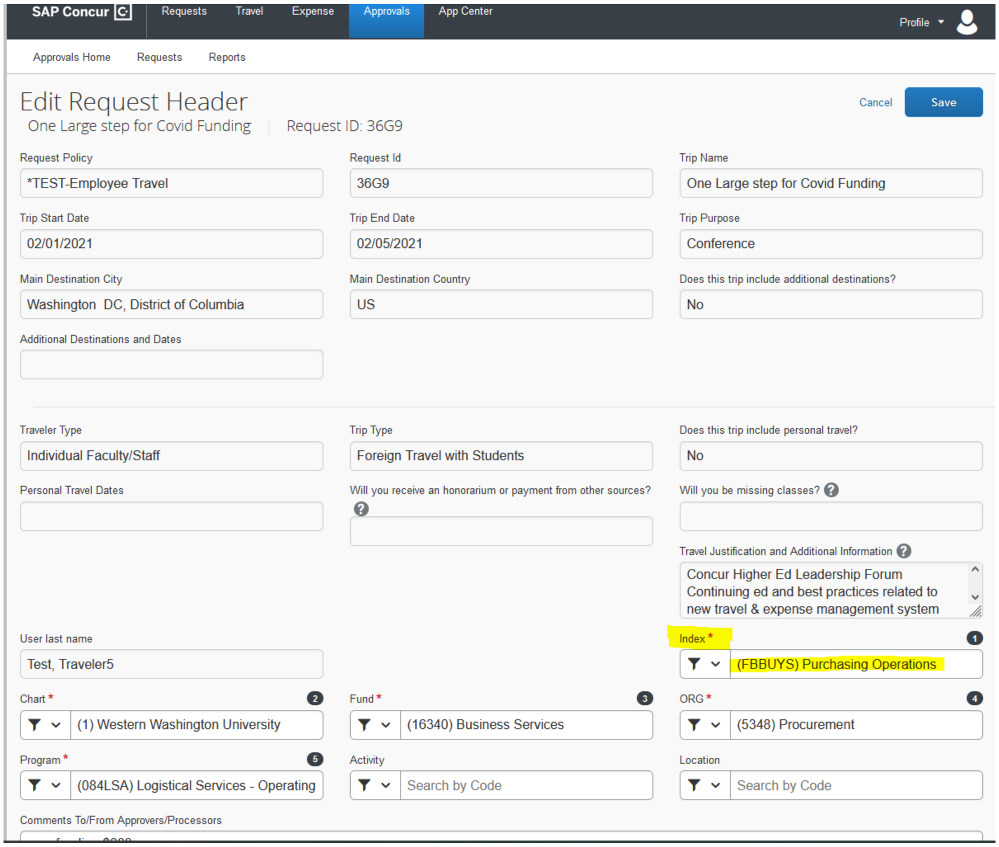
One Large step for Covid Funding $600.00

Pending Cost Object Approval | Request ID: 36G9

EXPECTED EXPENSES

☐	Alerts	Expense type	Details	Date	Amount	Requested	Approved
☐	⚠	Air Ticket	Bellingham (BLI) - Washington (WAS) : Round Trip	02/01/2021	$550.00	$550.00 Allocated	$550.00
☐		Ground Transportation/Taxi/Uber/Lyft	to/from airport/home/lodging	02/01/2021	$50.00	$50.00 Allocated	$50.00

Estimated Total: $600.00


SAP Concur
Requests
Travel
Expense
Approvals
App Center
Profile
Approvals Home
Requests
Reports
Cancel
Save

Edit Request Header

One Large step for Covid Funding | Request ID: 36G9

Request Policy: *TEST-Employee Travel

Request Id: 36G9

Trip Name: One Large step for Covid Funding

Trip Start Date: 02/01/2021

Trip End Date: 02/05/2021

Trip Purpose: Conference

Main Destination City: Washington DC, District of Columbia

Main Destination Country: US

Does this trip include additional destinations?: No

Additional Destinations and Dates:

Traveler Type: Individual Faculty/Staff

Trip Type: Foreign Travel with Students

Does this trip include personal travel?: No

Personal Travel Dates:

Will you receive an honorarium or payment from other sources?:

Will you be missing classes?:

Travel Justification and Additional Information: Concur Higher Ed Leadership Forum Continuing ed and best practices related to new travel & expense management system

User last name: Test, Traveler5

Index * ①: (FBBUYS) Purchasing Operations

Chart * ②: (1) Western Washington University

Fund * ③: (16340) Business Services

ORG * ④: (5348) Procurement

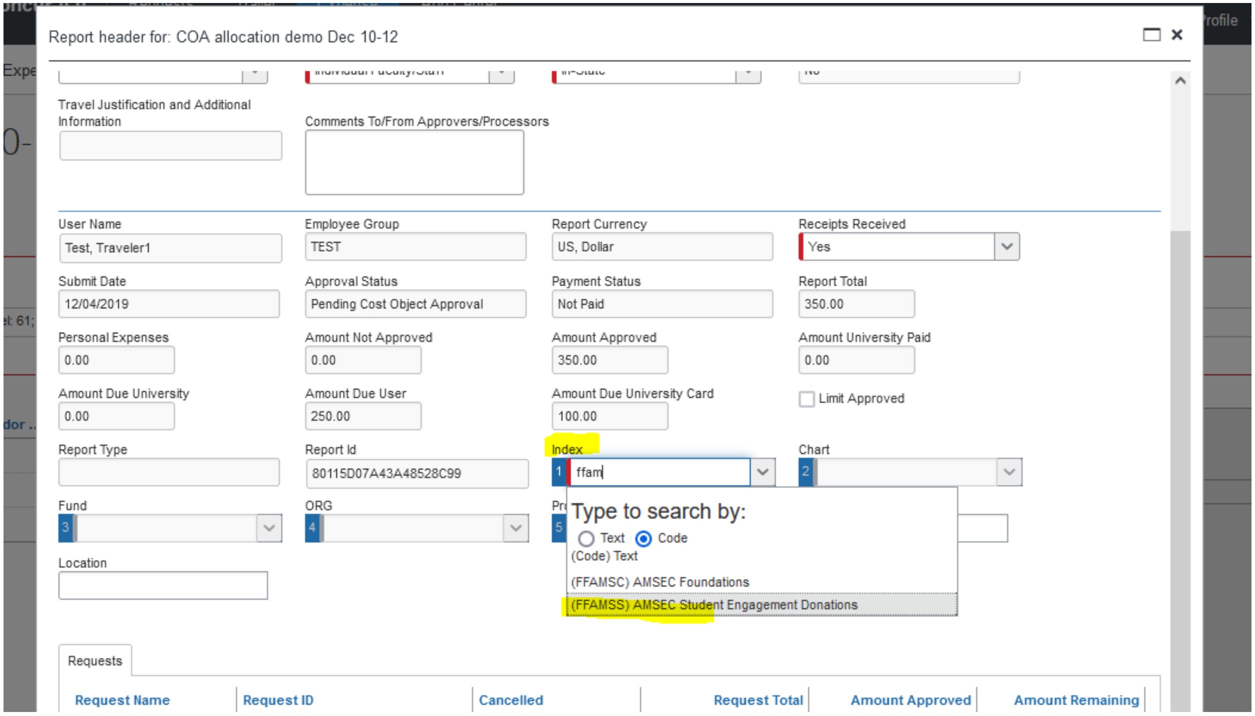
Program * ⑤: (084LSA) Logistical Services - Operating

Activity: Search by Code

Location: Search by Code

Comments To/From Approvers/Processors

5. To make changes on the Header funding, start by clearing the Index field and begin typing the correct fast index (enter GRANT for grant funding) and select from the list options below the field:



Report header for: COA allocation demo Dec 10-12

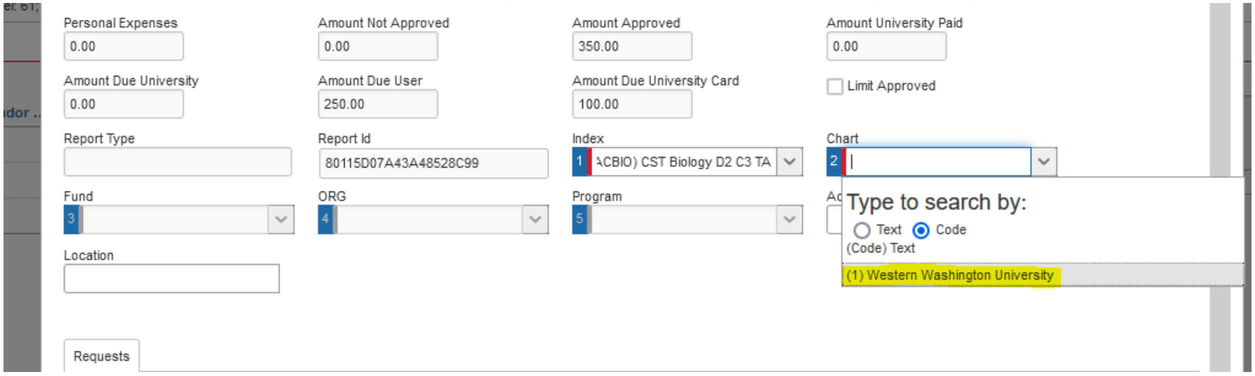
Travel Justification and Additional Information

Comments To/From Approvers/Processors

User Name Test, Traveler1	Employee Group TEST	Report Currency US, Dollar	Receipts Received Yes
Submit Date 12/04/2019	Approval Status Pending Cost Object Approval	Payment Status Not Paid	Report Total 350.00
Personal Expenses 0.00	Amount Not Approved 0.00	Amount Approved 350.00	Amount University Paid 0.00
Amount Due University 0.00	Amount Due User 250.00	Amount Due University Card 100.00	☐ Limit Approved
Report Type	Report Id 80115D07A43A48528C99	Index 1 ffam	Chart 2
Fund 3	ORG 4	5	
Location			

Type to search by:
○ Text ● Code
(Code) Text
(FFAMSC) AMSEC Foundations
(FFAMSS) AMSEC Student Engagement Donations

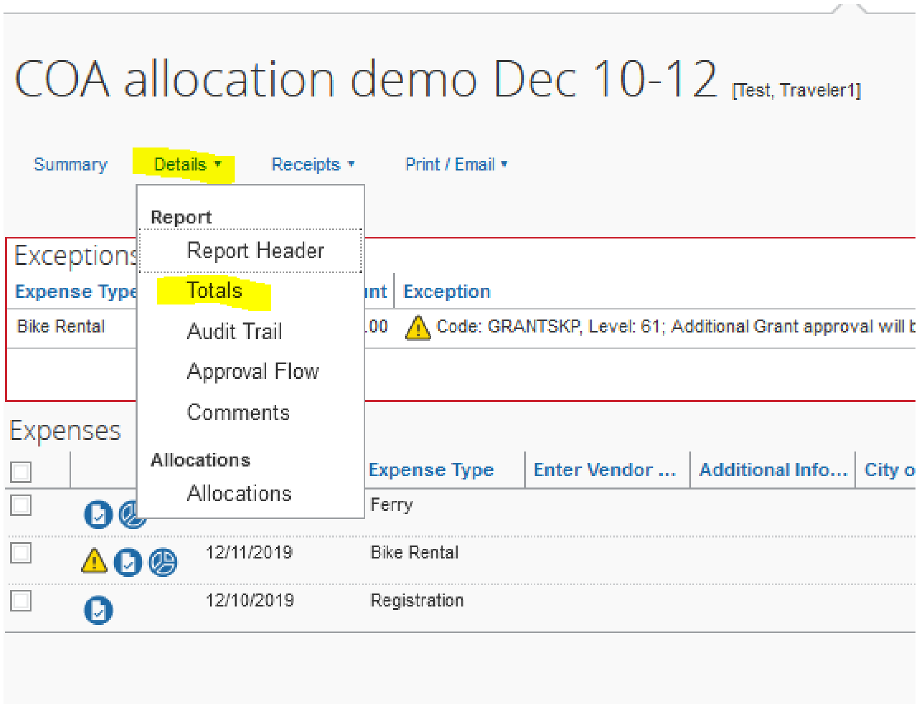
6. Click each successive field drop down to select the only list option:



Personal Expenses 0.00	Amount Not Approved 0.00	Amount Approved 350.00	Amount University Paid 0.00
Amount Due University 0.00	Amount Due User 250.00	Amount Due University Card 100.00	☐ Limit Approved
Report Type	Report Id 80115D07A43A48528C99	Index 1 ACBIO) CST Biology D2 C3 TA	Chart 2
Fund 3	ORG 4	Program 5	
Location			

Type to search by:
○ Text ● Code
(Code) Text
(1) Western Washington University

7. Add comments if desired. Select Save or cancel to return to the expenses page to review.
8. Total Approved (expense reports only) includes both reimbursable and paid by PCard expenses. Review amounts by clicking Details > Totals:



COA allocation demo Dec 10-12 [Test, Traveler1]

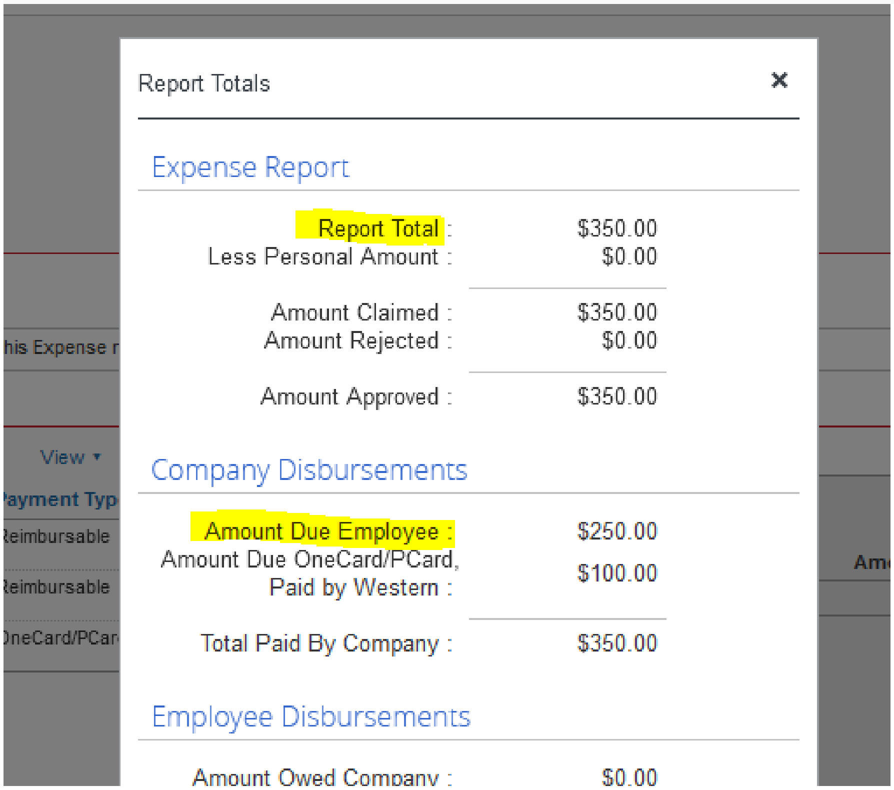
Summary
Details ▾
Receipts ▾
Print / Email ▾
Report
Report Header
Totals
Audit Trail
Approval Flow
Comments
Allocations
Allocations

Exceptions

Expense Type	nt	Exception
Bike Rental	.00	Code: GRANTSKP, Level: 61; Additional Grant approval will b

Expenses

☐			Expense Type	Enter Vendor ...	Additional Info...	City o
☐			Ferry			
☐		12/11/2019	Bike Rental			
☐		12/10/2019	Registration			



Report Totals

Expense Report

Report Total :	$350.00
Less Personal Amount :	$0.00
Amount Claimed :	$350.00
Amount Rejected :	$0.00
Amount Approved :	$350.00

Company Disbursements

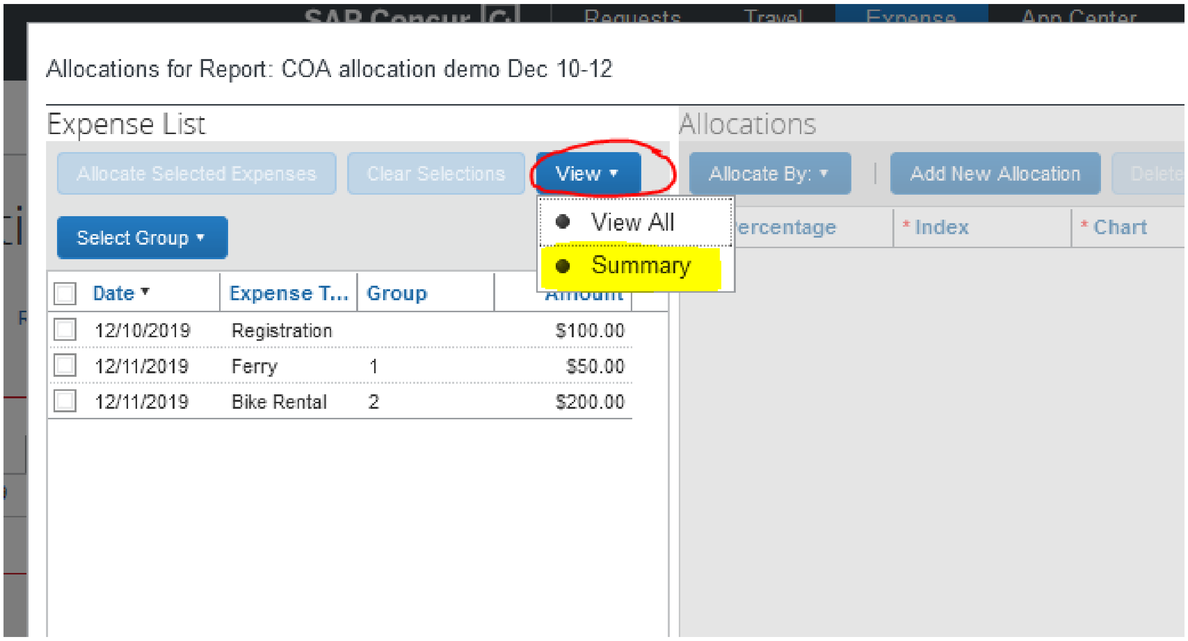
Amount Due Employee :	$250.00
Amount Due OneCard/PCard, Paid by Western :	$100.00
Total Paid By Company :	$350.00

Employee Disbursements

Amount Owed Company :	$0.00

×
his Expense r
View ▾
ayment Typ
Reimbursable
Reimbursable
OneCard/PCar
Am

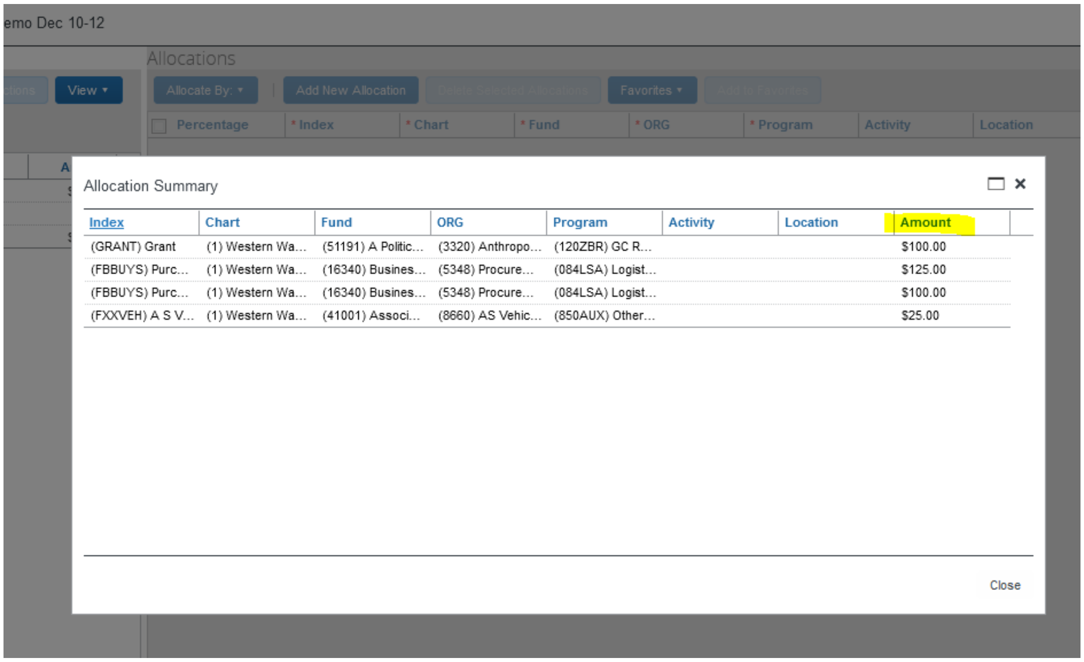
9. **Review Allocations** (if there are multiple funding sources) by clicking Details > Allocations > Summary:



Allocations for Report: COA allocation demo Dec 10-12

Expense List
Allocate Selected Expenses
Clear Selections
View ▾
Select Group ▾
● View All
● Summary
Allocations
Allocate By: ▾
Add New Allocation
Percentage
* Index
* Chart

☐	Date ▾	Expense T...	Group	Amount
☐	12/10/2019	Registration		$100.00
☐	12/11/2019	Ferry	1	$50.00
☐	12/11/2019	Bike Rental	2	$200.00

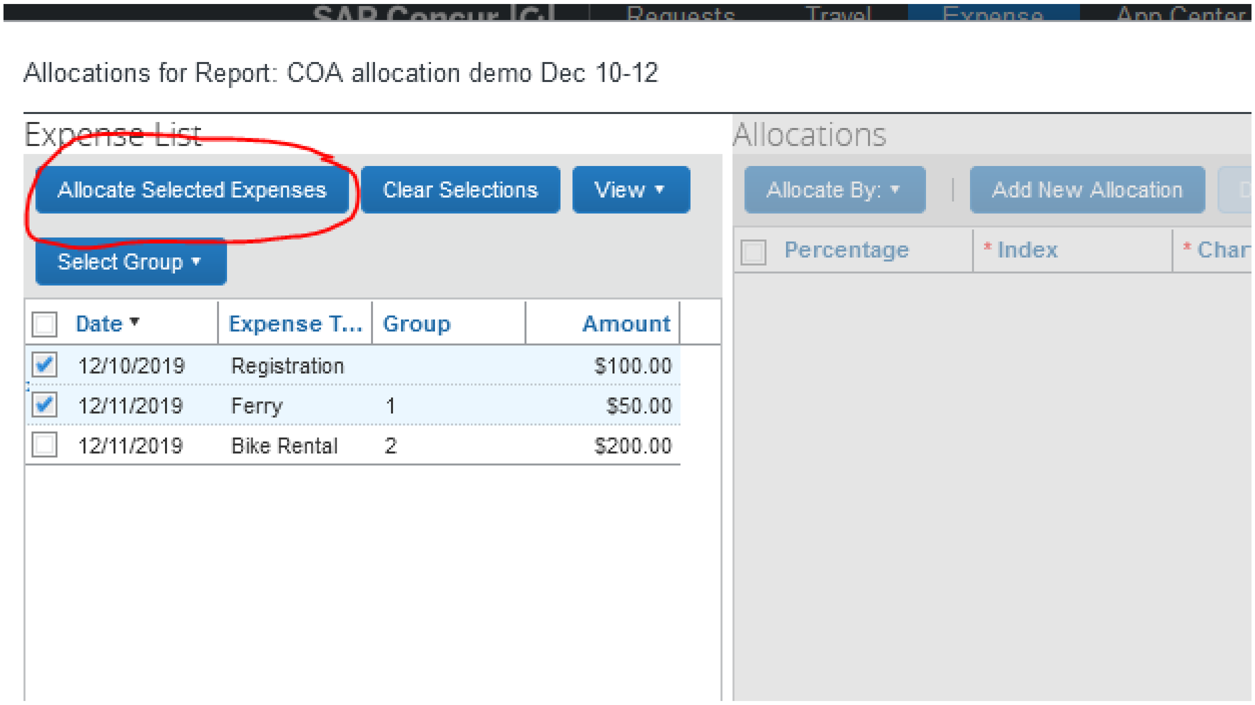


emo Dec 10-12
Allocations
View ▾
Allocate By: ▾
Add New Allocation
Favorites ▾
Percentage
* Index
* Chart
* Fund
* ORG
* Program
Activity
Location
Close

Allocation Summary

Index	Chart	Fund	ORG	Program	Activity	Location	Amount
(GRANT) Grant	(1) Western Wa...	(51191) A Politic...	(3320) Anthropo...	(120ZBR) GC R...			$100.00
(FBBUYS) Purc...	(1) Western Wa...	(16340) Busines...	(5348) Procure...	(084LSA) Logist...			$125.00
(FBBUYS) Purc...	(1) Western Wa...	(16340) Busines...	(5348) Procure...	(084LSA) Logist...			$100.00
(FXXVEH) A S V...	(1) Western Wa...	(41001) Associ...	(8660) AS Vehic...	(850AUX) Other...			$25.00

10. **To change funding allocations**, select one or more expenses and click Allocate:


SAP Concur
Requests
Travel
Expense
App Center
Allocate Selected Expenses
Clear Selections
View ▾
Select Group ▾
Allocate By: ▾
Add New Allocation

Allocations for Report: COA allocation demo Dec 10-12

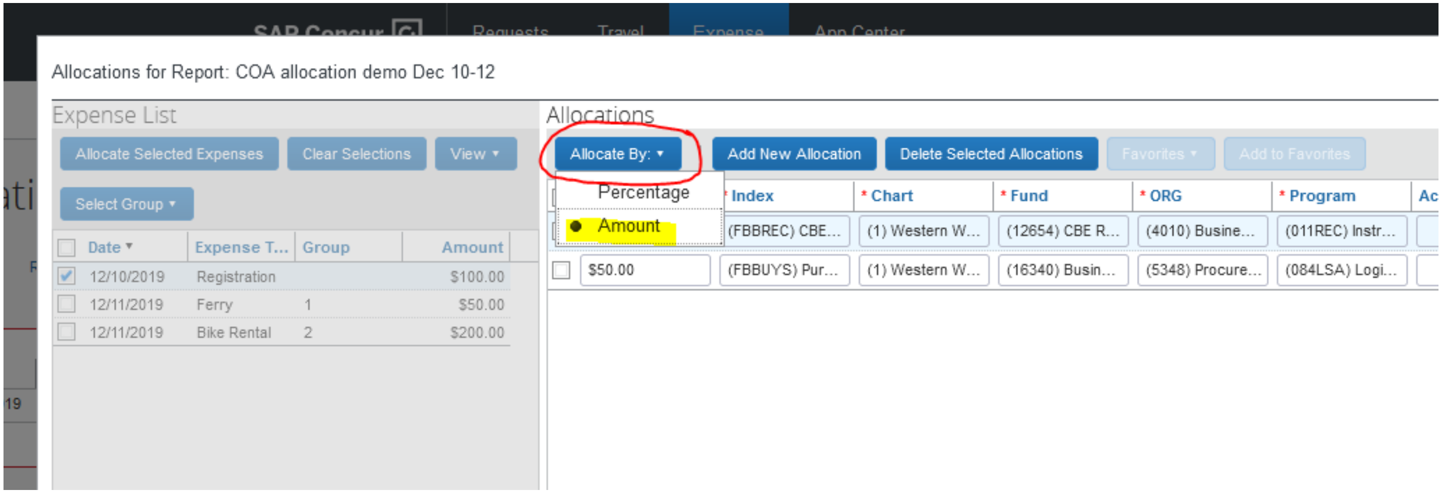
Expense List

☐	Date ▾	Expense T...	Group	Amount
☑	12/10/2019	Registration		$100.00
☑	12/11/2019	Ferry	1	$50.00
☐	12/11/2019	Bike Rental	2	$200.00

Allocations

☐	Percentage	* Index	* Char

11. Add allocations (funding sources) and split by Amount or Percent ***(Expense Report View):***


SAP Concur
Requests
Travel
Expense
App Center
Allocate Selected Expenses
Clear Selections
View ▾
Select Group ▾
Allocate By: ▾
Add New Allocation
Delete Selected Allocations
Favorites ▾
Add to Favorites
Percentage
● Amount

Allocations for Report: COA allocation demo Dec 10-12

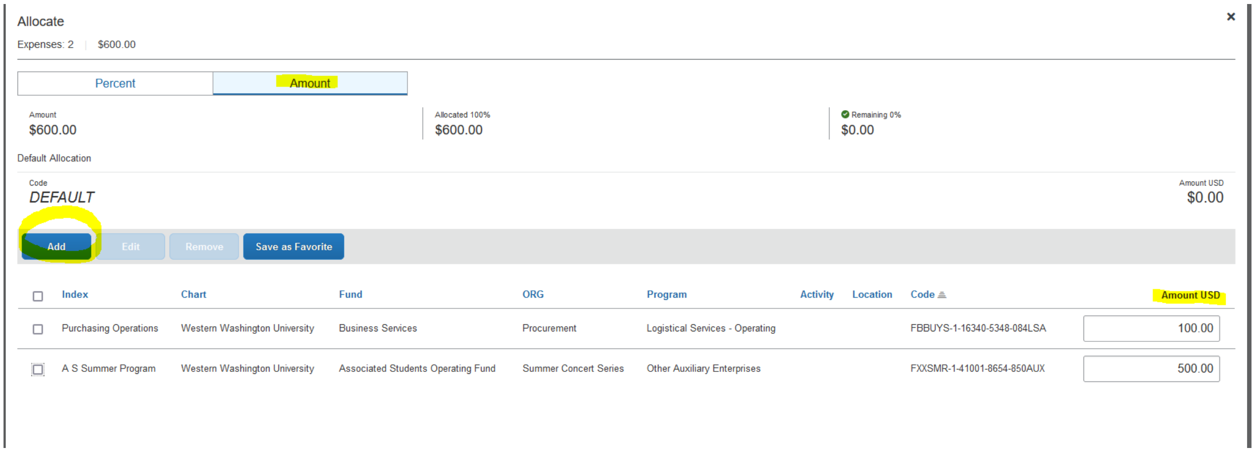
Expense List

☐	Date ▾	Expense T...	Group	Amount
☑	12/10/2019	Registration		$100.00
☐	12/11/2019	Ferry	1	$50.00
☐	12/11/2019	Bike Rental	2	$200.00

Allocations

		* Index	* Chart	* Fund	* ORG	* Program	Ac
		(FBBREC) CBE...	(1) Western W...	(12654) CBE R...	(4010) Busine...	(011REC) Instr...	
☐	$50.00	(FBBUYS) Pur...	(1) Western W...	(16340) Busin...	(5348) Procure...	(084LSA) Logi...	

TA Request View:



Allocate

Expenses: 2 | $600.00

Amount
$600.00

Allocated 100%
$600.00

✓ Remaining 0%
$0.00

Default Allocation

Code
DEFAULT

Amount USD
$0.00

☐	Index	Chart	Fund	ORG	Program	Activity	Location	Code	Amount USD
☐	Purchasing Operations	Western Washington University	Business Services	Procurement	Logistical Services - Operating			FBBUYS-1-16340-5348-084LSA	100.00
☐	A S Summer Program	Western Washington University	Associated Students Operating Fund	Summer Concert Series	Other Auxiliary Enterprises			FXXSMR-1-41001-8654-850AUX	500.00

12. Confirm your changes by reviewing the Allocation Summary as shown above in #9.
13. **When ready to approve** click the orange “**Approve**” button on the top right.
14. **If corrections are needed**, select More Actions and **Send Back to Employee**. Include instructions for changes needed in the comment.